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Africa's textile and apparel value chain – Its impact on special economic zones

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ABSTRACT

The textile, apparel and accessories (TA&A) industry, as well as the footwear industry, hold considerable potential for Africa in terms of economic advancements. These buyer-driven value chains demand for labour-intensive production, which creates employment for women and youth. This trade report will address the effects of the TA&A industry on special economic zones (SEZs), such as industrial parks (IP), on the African continent. It will elaborate on different countries' experiences with textile and apparel IPs, as well as the global experience and success stories from other continents.

About the Author

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Africa's textile and apparel value chain – Its impact on special economic zones

By Audrey Bessette

Introduction

The clothing and textile (C&T) industry impacts Africa on multiple scales. Social, legal and economic advancements have been witnessed. African countries also face more challenges in the balancing of these different areas as this industry holds a powerful place on the international scene, especially when related to trade. The decision-making process of governments needs a global view as this industry is based on the collaboration of many countries. SEZs, such as IPs, have enabled Africa to host the production of multiple sectors and industries by attracting foreign investment and reuniting a major labour workforce into delimited areas. SEZs represent delimited zones in which industrial development is promoted by establishing export strategies and by attracting foreign direct investment (FDI).

The impact of the fashion industry on SEZs is not clear-cut. The experience of the zones varies on a national level, as well as on a continental level. The garment and apparel value chain contains multiple steps and each one improves the country's GDP and creates new employment opportunities. The steps include the production of cotton, the spinning and twisting of the fibre into yarn, the weaving and knitting of the yarn into fabric and the bleaching, dyeing and printing of the fabric (African Development Bank, 2018). Africa's strength resides in every step, distributed between countries depending on the geographical area and production capacity. This study is also relevant for the negotiation of the AfCFTA as it needs to explore how we can develop this value chain in Africa. The SEZs offer mostly the *cut*, *make*, *trim* manufacturing dedicated to foreign continents. The ratio of export to international markets is way higher than the intra-African trade ratio. To answer the intra-African demand, they need to shift to full packages and original brand manufacturing, which requires investment in capacity building, technology, and associated support services. The AfCFTA is now being presented as a framework for Africa's industrialisation, and clothing and textiles have been identified as one of the priorities to support the continent's industrialisation. Negotiations on tariffs and rules of origin for clothing and textiles are still ongoing. The aim is to support the development of continental value chains, and for a number of African countries to take advantage of the textiles and garments trade.

This study examines the different impact of the C&T industry on SEZs across Africa. The first section discusses the worldwide experience, especially the Asian success story with this value chain. The second section is separated into different African countries such as Egypt, Ethiopia, Kenya, Nigeria, Togo, Benin, as well as Madagascar and Mauritius. Different partnerships and IP have been implemented to host apparel production and these countries have stood out by their implication in the textile and apparel value chain. Free trade agreements (FTAs), trade arrangements such as African Growth and Opportunity Act (AGOA) and the Multi-Fibre Arrangement (MFA) have also greatly influenced the development of IPs and zones dedicated to the textile and clothing industry.

1. Global experiences

The C&T industry influenced governments from around the world to adopt SEZ policies and therefore, to have the workforce and facilities needed to host production. Success stories in that direction have been particularly witnessed in Asia.

Experience varies depending on a country's resources and policies. Vietnam is one case of great success with nearly 400 IPs and SEZs. The country attracts a total foreign direct investment (FDI) of about US$12 billion with 80–90 per cent of this capital going to the manufacturing industry (Aurora IP, 2022). On the other end of the scale, India has been falling behind as a production hub even with the recent announcement of new mega textile IPs. The Indian government will build seven new parks in the upcoming years to reintegrate the C&T value chain (Dewan, 2021). China is the leader in production and investment for apparel and garments. Their SEZ policies and strategies for export-led growth are also considered as the most effective, which partially explain their 'miracle' economic growth. The Belt and Road initiative has promoted investment in other countries, which contributed to establishing SEZs. China developed and financed national-level overseas IPs to gain access to new resources and cheaper labour. This initiative contributes greatly to the development of the C&T value chain. On national territories, Shenzhen is one of the best-known SEZ success stories as it transformed a small fishing village into a thriving economic hub (Jahangir et al., 2019). Pakistan is also a new location of interest for investors in the garment industry where a Chinese company is currently investing US$150 million in an IP for sportswear worldwide exports. The factories will house state-of-the-art fabric units, dyeing facilities and garment manufacturing units (Jamal, 2021). Pakistan represents new opportunities for investors as other Asian countries, such as Vietnam and Bangladesh, are becoming overcrowded or do not have the infrastructure or conditions needed for setting up fabric units. Chinese companies have seen the potential of this country through their cheap labour and advantageous investment and tax policies for SEZs (Jamal, 2021). Bangladesh also uses SEZs in their quest for economic growth. The last few years have been categorised by many constructions and inaugurations of zones including the Mirsarai Economic Zone. This one is still under development. It is set to be the largest zone in Bangladesh with the capacity to create 1.5 million jobs within the first 15 years of operations. The government expects to earn US$15 billion from exports during these years (LightCastle Analytics Wing, 2019). The Mirsarai Economic Zone is also the first one to be multi-sectoral. The Bangladesh Garment Manufacturers and Exporters Association (BGMEA) offered an investment of US$2 billion to set up factories in this park, which could create 500 000 additional jobs (Ibid.). This is a perfect example of how the C&T value chain leads to the inauguration of new SEZs. Another success case in the textile and apparel industry is Turkey. Turkey is ranked the fourth largest textile exporter in the world. The country has consistently shown growth in the apparel and textile sector for many centuries. Both textile and apparel export values have more than doubled since the beginning of the 2000s (Smith, 2022). The geographical location of the country is particularly advantageous in regard to the export demands of the European market. A large proportion of the exports are distributed between Germany, the United Kingdom and Spain. Spanish company Inditex, owner of Zara, produces intensely in Turkey as it provides rapid production with shorter shipping routes. There are currently 18 active zones in the country, with an additional one still being established (Presidency of the Republic of Türkiye, 2022). Turkey qualify SEZs as investment zones. Whilst research shows a great proportion of the zones' activities are dedicated to manufacturing, there is no clear evidence of the impact of the C&T industry on these zones.

Latin America has been a long-time user of SEZ policies to attract investment. With great manufacturing capacities, the region has built around 500 zones. Whilst all Latin American economies have built zones, they are concentrated mostly in the Dominican Republic, Nicaragua, Costa Rica, Honduras and Colombia (WRI, 2019: 146). The Caribbean basin and Mexico have good access to the United States (US) market due to their proximity. The North American Free Trade Agreement (NAFTA) helped Mexico develop their relationship with the US and Canada, including in the clothing and textile area. For other countries, such as the Dominican Republic, the NAFTA negatively affected their C&T exports to the US as they were excluded from this trade-free zone. Other agreements, at that time, did not compensate NAFTA's negative impact on trade to the US. The US still invested about US$747 million in Export Processing Zones (EPZs) in the Dominican Republic in the early 2000s, expanding their manufacturing capacities (UNCTAD, 2005: 40). The US also made important investments in Honduras during the prime years of EPZs' development, especially for the textile industry. The strong Asian competition and the lack of industrial development in the zones limits the number of C&T exports Latin American countries can provide.

2. African experiences

The general performance of African SEZs do not seem to meet the expectations of success by the governments. Multiple reasons can explain this. One of them being the difference between the host country's comparative advantage and the SEZs' sectorial focus. About 89 per cent of African SEZs are multi-sectoral, while 10 per cent are specialised (Rodríguez-Pose et al., 2022: 460). Multi-sectoral zones present some advantages, but African countries would benefit from adopting more specialised zones. The lack of specialised zones can be explained by the challenges of obtaining technological improvement in less developed countries and by the slow capacity for building. These difficulties block the zones from specialising in certain sectors, from which they obtain more benefit. Multi-sectoral zones allow SEZs to produce for multiple sectors, but with a less effective approach and with restricted capacities. Multiple countries in Africa have stood out with their development of SEZs and their inclusion in the C&T value chain is now necessary to answer the growing need of the workforce and resources.

a) Egypt

Egypt has been known as an important quality textile exporter for many years. The country has built extensive infrastructure, including roads and ports. They also benefit from a great abundance of long and extra-long staple cotton. The apparel and textile industry is the second largest of the country, accounting for 3 per cent of the GDP and 27 per cent of the industrial sector (Kohan Textile Journal, 2020). The industry is distributed with 25 per cent being dedicated to textiles, especially home textiles, and the rest to apparel. The public sector dominates textile manufacturing, whilst the private sector produces 90 per cent of the garments. Egypt exports 305 00 tons of cloth and apparel per year and the US receives about 80 per cent of these exports. The EU and Arabian countries receive the remaining 20 per cent, leaving insignificant exports to African countries (Ibid.).

Egypt has built more than 2 500 apparel factories, creating 1.5 million employment opportunities (Kohan Textile Journal, 2020). Half of those jobs are occupied by women.

The predominance of the US market to Egypt can be explained by the Egyptian Qualified Industrial Zone (QIZ). A QIZ is a similar concept to SEZs, but those delimited zones are specific to Jordan and Egypt. It is a special partnership created by the US for companies to enjoy duty free access to the US. It also offers shorter shipping routes to the US compared to Asian producers. There are a total of six Egyptian QIZs (International Trade Administration, 2022). In 2017, China signed an agreement to build the largest textile IP in Egypt. The factories in this park benefit from the QIZ protocol. Parks are also benefiting African countries, as Egypt is starting to export more textiles to the rest of the continent.

b) Ethiopia, Kenya and Nigeria

In the last few years, Ethiopia has been an important manufacturing hub for fashion companies such as H&M, Calvin Klein, Tommy Hilfiger and many others. Ethiopia has shown great performance, especially in the textile industry. It is one of the top-performing African countries in terms of attracting FDI flows (Chege, 2019). China and Turkey are great investors in the textile and apparel production for Ethiopia. In 2017, many foreign companies installed parks in the country. American company PVH, which owns Calvin Klein and Tommy Hilfiger, as well as Dubai-based Velocity Apparelz companies (producers for Zara, Levi's and Under Armour) are contributing greatly to the increase of Ethiopia's manufacturing capacities. Chinese companies such as the Jiangsu Sunshine Group (Giorgio Armani and Hugo Boss) also focus on their relationship with Ethiopia as a potential leader in the production of these value chains. The Hawassa Industrial Park has been developed mainly to attract investment from textile and garment firms and therefore place Ethiopia as an asset in this value chain. Most firms enumerated previously are established in this park. The Kombolcha Industrial Park, the Bole Lemi Industrial Park and the Mekelle Industrial Park are also dedicated to the textile and apparel industry (CEPHEUS Research and Analytics, 2020: 2). The growing presence of this value chain in the world has therefore influenced the type of production in the parks. Ethiopia recently signed an agreement with Italy to work together on building a fourth agro-industrial park development dedicated to the fashion industry. The first three parks are already operational (Tadesse, 2022).

The country's target is to export textiles and apparel to the value of US$30 billion by 2030 (Chege, 2019). To do so, the Ethiopian Investment Commission (EIC), in collaboration with the private sector and international investors, has developed an IPs programme. It offers rapid industrialisation targets and is meant to attract fashion giants (Fibre2Fashion, 2022). The challenge for Ethiopia is to respect decent work conditions, while still attracting investment. About 80 per cent of workers in Ethiopia's apparel sector are women as they are often low-skilled and are less expensive to employ. The low-cost of labour is a double-edged sword; it attracts firms looking for low-cost labour-intensive mills, but also creates a bad reputation for Ethiopia as foreign companies do not want to be associated with poor human rights protection in the production environment. South Africa and North African countries also support the growth of the garment sector in their territories (Chege, 2019). However, working conditions are more legally protected. Another problem experienced by Ethiopia is the recent suspension of their beneficiary status under the African Growth and Opportunity Act (AGOA) (Bessette, 2022: 3). This is due to civil unrest in the Tigray region. Following human rights violations in the country, fashion companies, such as PVH, have announced the closing of their facilities in the Hawassa Industrial Park (Anna, 2021).

Kenya has been implementing EPZs earlier than Ethiopia. However, the results have not been as promising. Indian conglomerate Raymond, Kenya's Rivatex, and KICOMI built major textile factories (Chege, 2019). Unfortunately, these factories never achieved the expected profits, with costs exceeding revenues, and the government failing to reverse this even with many revival initiatives. While not being the biggest exporter of textiles and apparel, Kenya is one of the largest importers of second-hand clothing. This can explain the inability to grow this sector overall even with the trade preference under the AGOA.

In the 1970s and 1980s, Nigeria used to be home to Africa's largest textile industry. They had more than 180 textile mills and back then, the cotton, textile and garment sector employed the biggest portion of the population after the public sector. Manufacturers accounted for more than 450 000 jobs and there were more than 60 000 local farmers working for the fashion industry (Chege, 2019). After this 'golden era', Nigeria has been facing a slowdown in this market. Many of these companies closed down in the 1990s. As of the late 2000s, there were only 24 textile factories left with fewer than 25 000 workers (Owen et al., 2016: 100). This might change soon with the development of IPs. In 2018, China's largest textile manufacturer, Shandong Ruyi Group, signed a Memorandum of Understanding (MoU) with Nigeria for the development of a US$600 million textile IP in Kano (Chege, 2019).

c) Togo and Benin

Other West African countries have had different experiences with the textile industry. Togo and Benin provide full opportunities of production for fashion companies as they offer many comparative advantages, such as the proximity to the EU and the US and a great cotton availability. Labour cost is lower than Asian markets and it takes about half the time to export to the EU and the US (Apparel Resources News-Deck, 2021). Togo has been described as a 'limitless prospect in the cotton and textile industry'. The competition remains in the low price of textiles coming from Asia. In the early 2000s, Asian textiles were sold at prices 10 times lower than Togo's textiles. However, in the next few years, Togo aims to lower their cost of production with better infrastructure, lower electricity costs and easier road access for exportation. These changes will be supporting the newest solar plant project Togo has created. The AfCFTA is also meant to improve infrastructure through more integrated value chains (Oxford Business Group, 2021).

Togo and Benin are working similarly on their IPs to ensure environment-compliant designed parks with vocational training centres as well. Togo received positive feedback from the international scene for their implication in the SDGs whilst producing textiles. In 2021, the country developed the Plateforme Industrielle d'Adétikopé (PIA), which is a multi-sectoral IP focusing on the local transformation of premium quality cotton. It is a public-private partnership between Togo and the company ARISE IP (Oxford Business Group, 2021). This park, meant to place Togo as a leading cotton exporter, offers a wide range of sustainability promises and measures. For example, the cotton processed is entirely sustainably sourced and complies with the Cotton Made in Africa Standards. Additionally, it uses only renewable electricity and recycles more than 90 per cent of the water used for production (Ibid.).

Benin is the sixth-biggest cotton producer in the world. West African countries are well known in the textile value chain for the quality and abundance of their cotton plants. However, they only process 2 per cent of their raw cotton locally, while exporting about 89 per cent for the production of textiles and apparel (Oxford Business Group, 2021). West African countries are being greatly disadvantaged by importing more expensive textiles and apparel while exporting lower value spun or unspun cotton. Those countries do not truly benefit from the added value of textile production. The government of Benin has been making progress in terms of capacity building along the entire value chain. A textile park in Glo-Djigbé, 45 kilometres away from Cotonou, will accommodate up to 30 factories for clothing production. It could process around 100 000 tons of cotton fibre per year (Ibid.). This park is expected to have positive economic outcomes as it can create up to 250 000 jobs from cotton spinning to clothing manufacturing. Benin is a great example of how the fashion value chain pushes governments to install SEZs and, therefore, benefit from a better producing lever in the chain.

The AfCFTA could solve many issues regarding the integration of West African countries in the fashion value chain. This continental agreement should increase exports for the textile sector, but also boost the investment in related infrastructure (Oxford Business Group, 2021).

d) Mauritius and Madagascar

Mauritius has also witnessed an increase in the presence of EPZs, the older form of SEZs, in the 1970s and 1980s. The government of Mauritius developed these types of exporting zones earlier than most African countries to attract FDI and to address international textile demands. As of the mid 80s, two thirds of all FDI inflows were dedicated to the zones and were coming mainly from Asia to produce garments (UNDP, 2020: 11). The unemployment rate has benefitted from all these investments as it has decreased radically. In the early 90s, FDI flows began to decline, going from US$12.8 million (1985–1989) to US$8.4 million (1990–1997) (Ibid.). It is still considered a good amount of FDI flow, but the manufacturing sector lost a major part of its attraction to investors.

Mauritius remains one of the most present African countries in the textile and clothing value chain. The country present major advantages for this sector, with also a few disadvantages. Whilst it should not be considered as a weakness, Mauritius is a medium-wage country, and it faces major competition from low-wage countries as the fashion sector requires a large number of low-skilled workers with the lowest cost possible. Another reason Mauritius is facing a slowdown of their textile sector is the dismantling of the Multi Fibre Agreement (MFA) in 2005. The privileged access to the EU and North American markets for developing countries is now eliminated and Mauritius must face competition from giant Asian exporters (Khirodhur, 2016: 4). The MFA contributed greatly to the development of SEZs in Mauritius. After 2005, many factories closed and relocated causing important job loss. The government failed to provide adequate support for restructuring strategies of the TA&A value chain. The loss of preferential tariffs pushed firms to adopt new technologies in order to remain competitive. As a result, the type of workers needed has changed (Khirodhur, 2016: 7). In the case of Mauritius, technology does not seem to counterbalance low-cost production offered in other countries.

More effective SEZ policies could be a solution to promoting the reintegration of Mauritius into the TA&A industry as it can increase productivity. The government should foster the creation of spinning mills with the contribution of investors. This could help Mauritius meet the Rule of Origin standard of AGOA as one of the beneficiary countries (Khirodhur, 2016: 12). Whilst this section has discussed the difficulties of Mauritius, it is important to consider their part in the clothing value chain as a valuable one.

Madagascar has been recognised as the top exporter of textiles to the EU and in the top three exporters to the US amongst sub-Saharan African countries (International Trade Administration, 2021; online). Madagascar is a similar case to Mauritius; the phasing out of the MFA in 2005 has limited the success story of EPZs in the following years. In Madagascar, we qualify EPZs with the *Zone Franche* regime. More than half of the firms of the *Zone Franche* provide for the clothing and textile value chain (RFI, 2021). The *Zone Franche* represented more than 150 000 jobs in 2021. The C&T value chain created around 400 000 jobs in total (within and outside the zones) (International Trade administration, 2021). The impact of the pandemic on the C&T industry is causing concerns amongst fashion companies producing in Madagascar as a new legislative bill might end the financial regime of the zones (RFI, 2021). The advantages of producing in Madagascar would become limited. The country offers competitive wages, less than one third of Mauritius' labour cost (Cling et al., 2007: 4).

The inclusion of Madagascar in the AGOA has also influenced their presence in the C&T value chain, and therefore, the development of zones. The duty-free access was gained in 2000 for this country. The exports of apparel increased rapidly afterwards. In 2010, Madagascar was suspended from AGOA following the 2009 coup and political crisis, which represents a failure to comply with their requirements (AGOA.info, 2021). Madagascar’s sanctions led to a decline in total US exports. However, not all sectors of exports had the same outcomes. The textile industry was affected negatively whilst clothing exports increased. About 100 000 jobs were lost during the suspension and the GDP dropped to almost 11 per cent (Ibid.). Before the suspension (years 2001–2009), the preferential access to the US markets and the advantageous Rule of Origin increased drastically in the textile exports of Madagascar. This led to a reallocation of productive resources from the country to the textile EPZs. The rest of the economy suffered from this reallocation as prices rose outside the zones and it became harder to compete with textile exports. For example, exports of other manufactured products like coffee, tea and spices declined greatly. The overall exports rate decreased between 2004 and 2009 (Andriamananjara et al., 2015). During the ‘sanction years’ (2009–2014), Madagascar moved its workforce to other sectors as the textile industry was suffering. Resources and factors of production were reallocated out of the zones to focus on non-apparel products. The exports of apparel and clothing dropped from 65 per cent during those few years (Ibid.). In 2015, Madagascar regained their beneficial status under AGOA which has led to a slow return to the textile production (AGOA.info, 2021).

Opportunities for Madagascar include developing their exports to the US through AGOA again, exporting to the EU markets, developing trade with regional markets such as the Southern African Development Community (SADC), the Common Market for Eastern and Southern Africa (COMESA), and the Indian Ocean Commission (IOC) (International Trade administration, 2021). The need for investment in new production facilities is growing as the country has been criticised for their lack of industrialisation. The country could also reinforce their collaboration with France, as many French investors and French clothing companies are interested in developing facilities in Madagascar due to their common language.

3. Conclusion

Africa became a great asset to the fashion value chain through the implementation of SEZs. These case studies demonstrate how the C&T value chain has pushed producing countries to build strong SEZ policies and infrastructure. The challenge remains in the rapidity of industrialisation. Africa needs to fasten their industrialisation to benefit from their implication in the textile and garment industry. Industrial parks contribute to this goal, as they attract many FDIs to reinvest in the infrastructure, labour, technology and capacity building.

Countries have experienced different outcomes from their integration in the clothing and textile value chain. Comparative advantages, such as cotton seed availability and low-cost labour, have influenced the path of African countries. Timeline also differs greatly between countries and the rise of SEZs on their territories. This report highlights the different impact of FTAs such as the MFA and the AGOA. FTAs hold an important influence on the economic gains of the zones, as well as the profitability of the production of apparel and textiles. This trade report is particularly relevant with the negotiations of the AfCFTA, as there are important discussions on how to integrate SEZ policies with a continental free trade arrangement. This report illustrates how, for certain countries, SEZs are essential parts of their influence and economic gain in the C&T value chain.

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